I. Abstract

South Africa’s Women’s Budget Initiative (WBI) is a pilot project spearheaded by the Commonwealth Secretariat in its endeavor to promote gender issues in the macroeconomic policies of its member countries. The WBI assesses the national, provincial, and local budgets from a gender perspective by tracking the impact of the budget on women.

Many South African ministries have now accepted the concept of analyzing their budget from a gender perspective. Civil society agencies and women’s groups at the local level can participate in project activities through collaborative workshops with organizations such as GETNET (the Gender Education and Training Network) and UNIFEM (the United Nations Fund for Women). As follow-up to one of these meetings, a simplified version of the workshop findings was published for the general public, particularly for women’s groups.

A strong alliance between civil society activists and government departments is one of the key features of the project. An important point to note is that the concrete impact of such projects, which have a national scope, usually is observable over time after a slow and gradual process.

II. Background

South Africa’s Women’s Budget Initiative was launched in late 1995. The initiative is closely linked to the end of the apartheid era that lasted from 1948 to 1993. During this period, black South Africans were denied jobs and educational opportunities, and their access to economic opportunities and basic services such as housing, health, and transport was limited. Furthermore, black women were denied participation in various aspects of life and were forced to do menial jobs under exploitative conditions, often coupled with violence and sexual harassment. In 1994, the first democratic elections took place in South Africa. Most of the parliamentarians in the new government were involved in the struggle for women’s equality during the apartheid era. They were keen to establish and regulate policies that were gender-sensitive and also ensure the government’s commitment to implement these policies.

The Fourth World Conference on Women held in Beijing in September 1995 focused on the Commonwealth’s endeavor to incorporate gender issues in the macroeconomic planning and policymaking of its members. South Africa, one of the participating member countries, committed to bring about gender equity in the country by addressing the critical issues outlined in the declaration made at the conference—the “Beijing Platform of Action.” In 1984 a gender-responsive budget analysis had been pioneered in

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Australia. The Commonwealth Secretariat saw this as a first step in tackling the issue of gender and macroeconomics. Pregs Govendor, one of South Africa’s 100 new women members of parliament (MPs) and a panelist at the conference, further advocated this concept. South Africa was the first nation to join the pilot project on gender budget analysis initiated by the Commonwealth Secretariat.

The Women’s Budget Initiative was launched with the collaborative efforts of parliamentarians (the Joint Standing Committee on Finance) and two nongovernmental organizations (NGOs)—the Institute for Democracy in South Africa (IDASA) and the Community Agency for Social Enquiry (CASE). In 1996, the Committee on the Status and Quality of Life of Women replaced the Joint Committee of Finance and became the official partner of WBI. In addition, researchers were selected from various nongovernmental organizations (NGOs) and academic institutions. This team of researchers was, in turn, supported by a reference group consisting of selected parliamentarians, government officials, and members of NGOs. From 1996 to 2000, a “women’s budget” was prepared annually.

The idea behind the budget exercise was to analyze any form of public expenditure or method of raising revenue in the context of the benefits that would accrue to women and girls in relation to men and boys. The first phase of the initiative focused on four sectors—welfare, education, housing, and the Reconstruction and Development Program—as well as on the cross-cutting themes of taxation and public sector employment. The second phase, launched in early 1997, included areas such as health, justice, safety and security, correctional services, transport, home and foreign affairs, agriculture, land affairs, and energy. Under the initiative, public expenditures were analyzed in three categories, namely:

- amounts allocated to women-specific projects to determine the level of gender-specific expenditures;
- affirmative action and other policy initiatives in government employment, which promote the development of female staff members; and
- funds allocated to all other policies and programs of government, and the effect of these expenditures on women relative to men in the aggregate, and on different groups of women.

The NGOs collect information, undertake research, and produce the analyses. The parliamentarians provide access to information, focus in terms of key political issues, and offer the necessary official support.

Each sectoral analysis begins with an evaluation of the existing position of women and men, and girls and boys, in terms of issues such as education, health, and safety. Next,

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1 The South African Constitution has extended certain powers to the committees involved in the implementation of the initiative. These include the power to summon people to give evidence and produce documents, to request reports from any person or organization, and to receive submissions. In addition, committees can monitor inquiries into and make recommendations related to any aspect of policy formulation or any other matter that it may consider relevant for government department(s) falling within the category of affairs consigned to the committee. Source: <http://www.genderbudgets.org/activities/Towards/Pregs%20speech.doc>.
current government policy is assessed to determine whether it correctly addresses the requirements of the situation. Then the analysis determines whether adequate amounts of resources are being allocated to implement the gender-sensitive policy. Finally, an attempt is made to find out whether the resources allocated were used effectively to achieve the intended goals.

In the first year, the initiative was supported by the core funding of one of the NGOs, sourced from the U.S. Agency for International Development (USAID) and the Ford Foundation. In subsequent years, the initiative received support from the Netherlands Embassy, the Commonwealth Secretariat, the Ford Foundation, UNIFEM, the Charles Stewart Mott Foundation, Oxfam-Canada, the Novib Gender and Development Fund, and GTZ’s (the German agency for technical cooperation) Pilot Project Gender.

Many countries, such as the United Kingdom, Mozambique, Namibia, Uganda, Switzerland, and Tanzania have incorporated gender equality in their budgets. Worldwide, there are 40 such initiatives, at various stages of development.

III. Impact/Results

A gender analysis of the budget in all of the key ministries and development sectors in South Africa took place over a period of four years after the project’s inception. This work is documented in a series of four books with the title *Women’s Budget*, published by IDASA.

A key outcome of the project is the inclusion of gender case studies in the results compiled on the parliamentary budget day. In the fourth year, five case studies were published, covering such diverse areas as local government, donor funding, and the gender implications of allocations for job creation.

The research revealed key findings in many areas. Analysis of pension policies (1997) indicated that, although women were predominant in the workforce in the informal sector and in seasonal, part-time, and contractual work, policies that provided for pension and retirement funds were not extended to these sectors. Similarly, transport subsidies applied only to those who held weekly or monthly tickets, discriminating against those who did not hold regular jobs. Unemployed people in search of jobs and those working in the informal sector (most of whom are women) who traveled at irregular intervals and by varying routes did not qualify for the subsidy.

Universities have incorporated gender budgets into either standard teaching programs or the courses offered for nontraditional students. The Commonwealth Secretariat is supporting a pilot project in South Africa called the Gender and Macroeconomic Policy Initiative. This project was introduced within less than a year of publication of the first research of the WBI and is led by the Department of Finance.
Box 1: Education

Approximately 85 percent of the education budget was allocated to primary and secondary education. Higher education accounted for about 15 percent of the budget, and at this level, women outnumbered men. However, men dominated in courses related to science and technology, areas that promised higher rewards for graduates in later life, and that were more expensive in terms of state allocations.

In 1995, 20 percent of adult South African women and 16 percent of men were illiterate. However, just 1 percent of that year’s education budget was allocated to adult basic education. WBI argued that the funding was inadequate and disadvantaged both men and women. According to the latest available information, this figure has increased to 2 percent of the education budget, perhaps still not sufficient to bring about significant improvements in adult education.

Box 2: Public Works Program

WBI found out that 40 percent of the employees in public works programs were women. Women occupied only 27 percent of management positions in the national government and only 38 percent in provincial administrations. While 37 percent of the men received training, only 32 percent of the women did.

WBI proposed gender sensitization of these programs by providing women with both (1) immediate income-earning opportunities in the form of jobs, and (2) future income-enhancing activities in the form of training. As a result, out of 42,000 jobs created by the Working for Water Program in the first quarter of 1998, 55 percent were allocated to women.

IV. Key Elements of Empowerment

Information

The parliamentarians, local councilors, and civil society agencies can access information on key findings through training sessions and workshops. WBI has also collaborated with UNIFEM to organize workshops for information dissemination, especially among women’s groups. In addition, the results and findings of each year’s research are presented in a workshop a few days before the budget day in parliament. The presentation is attended by parliamentarians, women’s groups, civil society agencies, and the media.

In order to ensure accessibility of the WBI results to the general public, a simpler version of the key findings is published in a series of books with the title *Money Matters*.  

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3 Budlender and Hurt (1998, 2000, 2001). The 1998 book looks at the budget allocations of eight government departments and shows the different impacts that economic policies have on women and men. The 2000 book looks at how the budgets of local municipalities affect poor people. Each of the chapters looks at the municipality’s budget and
Inclusion/Participation

In the initial years, the scope of WBI was limited to national and provincial level budgets. The focus has now shifted to the local sphere, with increased analysis of municipal budgets. This reflects the intention of the WBI team to increase participation by women at the grassroots level.

WBI has collaborated with the Gender Education and Training Network to develop materials for training and also to produce simplified versions of the key findings of the budget. This has encouraged the participation of a wider audience from civil society.

WBI is also working with a South African NGO, Women’s Net, in setting up a Website on which women can make comments on the budget to be forwarded to the Minister of Finance. The results of the discussions held in the workshops organized by UNIFEM are presented to the parliament to influence its discussions on the budget.

After the 1994 democratic elections, the lower and upper houses of the parliament had together more than 100 women MPs. The collective effort of these women played a key role in instituting policy changes and introducing the concept of a gender-sensitive budget analysis in the ministries of the government.

Accountability

The main objective of this exercise is to make the functioning of the government transparent and to hold it accountable for implementing gender-responsive policies in the postapartheid era. In one such instance, the gender budget analysis revealed that despite the government’s adoption of a Domestic Violence Act and the formal allocation of 2 million rand (the currency of South Africa) for its implementation, no financial expenditures were actually made.

The simplified versions of the findings give a clear and an accurate picture to the NGOs and other community-level women activists as to what are the existing monetary allocations and to what extent women benefit from them.

V. Issues and Lessons

Challenges

The Women’s Budget Initiative seeks to benefit women at the grassroots community level in terms of gender-specific issues. Steps such as simplifying the key budget findings, training, and the organization of workshops have been undertaken to encourage greater participation in NGOs and community activism. In spite of these efforts, most

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4 In the 1994 elections, women made up 28.5 percent (114/400) of the total members of the Lower House and 16.7 percent (9/54) of the Upper House of the Parliament. Source: <http://www.africaaction.org/action/ipu.htm>.
people without tertiary education still find it difficult to understand even simplified information sources because of the length, style, and level of detail. Considering average education levels in South Africa, the publication *Money Matters* reaches only one-third of the adult population of the country.

After 1994, the new central government introduced many new policies and regulations. The implementation of these new norms receives greater attention from the parliamentarians compared to the gender analysis of the budget, which is often sidelined as an “extra” activity. For instance, when the Minister of Finance gave his budget speech in February 2000, there was no mention of women or gender in his presentation.

The project received even less consideration with the departure of such key players as the Deputy Minister of Finance, a British consultant in the budget office, and Pregs Govendor’s temporary leave in 2000. This reveals the vulnerability of the project and lack of interest of the other members of the parliament in project implementation and follow-up. There is a need to broaden the participatory base by reducing the level of dependency on a few political leaders.

**Key Factors for Success**

A key feature of the project was the ability to draw participants from different backgrounds and experiences. Individual researchers and members of the reference group had various backgrounds, ranging from economics to sociology. Moreover, new members were elected for the reference groups each year. The involvement of a wide range of people created an opportunity for a number of diverse ideas to be put forward, and, perhaps, even helped to discover the implications of particular expenditures for different groups of women.

Many people who now hold important positions as cabinet ministers in South Africa were active opposition players in the apartheid era. Therefore, they could together form a strong political culture in support of continuing gender budget analysis. A country intending to replicate the project should keep in mind that support from within the government is a prerequisite for the success of the project, given the fact that outside bodies have less of a chance to influence government policy.

The Women’s Budget Initiative was a part of the gender machinery employed by South Africa to tackle the problem of gender inequality within the country. It is important to note that the impact of such initiatives is felt only in the medium to long term. Policy changes and implementation on a national level, based on the recommendations of the gender-segmented findings, is a slow and gradual process. Concrete differences in terms of greater gender equity and empowerment of women in the country perhaps will take even more time to emerge.

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VI. Further Information: References and World Wide Web Resources


Schneider, Katrin. 2002. “Gender Sensitive Budgeting as a Strategic Instrument of Ministries of Finance for Sustainable Poverty Reduction.” Background Paper for the Conference on Sustainable Poverty Reduction and PRSPs. Challenges for

